Standard Operating Procedure
04 - Managing Projects within Project Workbench

A. Purpose

This process documents the steps taken to facilitate the management of Projects within Project Workbench.

B. Responsibilities

The following Department participates in this process and is tasked with the following responsibilities:

- **Maintenance Manager/Project Coordinator**
  The Maintenance Manager/Project Coordinator is responsible for creating and screening projects and phases, scheduling phases and reporting on Project Request history.

C. Process Overview

Maintenance Manager/Project Coordinator

Step 1: Project Request is entered.

Step 2: A determination is made whether the scope of the work is related to a pre-loaded survey identified project

Step 3: The survey identified Project Request is associated

Step 4: Project Request phases are entered.

Step 5: A determination is made for the availability of labor.

Step 6: A determination is made for the availability of funding.

Step 7: Project Phases are created per shop.

Step 8: Project Requests and phases are screened within Project Workbench.

Step 9: A determination is made for the scheduling of phases.

Step 10: Project Phases are scheduled within Project Workbench, at a later date.

Step 11: Work is postponed pending available labor.

Step 12: Work is postponed pending available funding.

Step 13: Report detailing Project Request Cost History is printed.

D. Process Steps

Maintenance Manager/Project Coordinator

Step 1: Project Request is entered.

Access Project Workbench

- Access Project Workbench Form by clicking on the form in the Navigator. *(PROJECT/PROJECT WORKBENCH)*

Access Project Request Form

- Access Project Request Form by clicking on the [ADD REQUEST] button from the Project Workbench Form.
  - [TAB] out of the PR Number field. *(CAMIS will automatically create PR number when record is saved).*
  - Enter description of work. *(64 characters can be entered)*
    - Enter Parent Project Number, if applicable. It is the Maintenance Manager's responsibility to determine the scope of the project is contained in a pre-existing project or pre-loaded building deficiency, than the pre-existing project number should be copied and pasted into the "Parent Project" data field. If the entire scope of work is *(Use the List of Values, CTRL/L if needed)*
    - Enter Capital Project Number, if applicable. *(Use the List of Values, CTRL/L if needed)*
    - Enter Non-Available time *(200 characters can be entered)*

Requesting Information

- Enter Requestor Name *(Use the List of Values, CTRL/L if needed)*
  - Ex: Last Name, First Name
- Enter Telephone number
  - Ex: XXX-XXXX ext.
- Enter Department

Alternate Requestor, if applicable

- Enter Alternate Requestor Name *(Use the List of Values, CTRL/L if needed)*
  - Ex: Last Name, First Name
- Enter Telephone number
  - Ex: XXX-XXXX ext.
- Enter Department

Location Information

- Enter Site *(Use the List of Values, CTRL/L if needed)*
- Enter Building *(Use the List of Values, CTRL/L if needed)*
- Enter Floor *(Use the List of Values, CTRL/L if needed)*
- Enter Room *(Use the List of Values, CTRL/L if needed)*

Equipment Information

- Enter Equipment ID if the project is associate with an inventoried equipment or Building Subsystem *(Use the List of Values, CTRL/L if needed)*

General Information

- Enter Maintenance Type
- Enter Priority – Facility In House Project *(Use the List of Values, CTRL/L if needed)*
  - 21 FAC Emerg (30 days)
  - 22 FAC High (90 days)
  - 23 FAC Med (180 days)
  - 24 FAC Low (365 days)

- Enter Priority – DCAM Capital Project *(Use the List of Values, CTRL/L if needed)*
  - 41 DCAM Emerg (90 days)
  - 42 DCAM High (365 days)
  - 43 DCAM Med (730 days)
  - 44 DCAM Low (1460 days)

- Enter Status *(Use the List of Values, CTRL/L if needed)*
  - ACTIVE (new project)
  - APPROVED (Customer approved of Project)
  - ESTIMATING (Project is in the estimation stage)
  - PENDING (Project postponed)

- REQUESTED (Project Requested, not yet approved)
- AWAIT $$ (Awaiting funding)
- ON HOLD (Awaiting resources)
- REJECTED (Project rejected)
- CANCELED (Project Canceled)
- COMPLETE (Project is complete)

- Enter Assigned To *(Project Coordinator)*
- Enter Project Manager *(Project Coordinator)*
- Enter Requested Start Date *(Customer requested start date)*
- Enter Requested Due Date *(Customer requested end date)*

Billing Information

- Access the Billing Window by clicking on the [BILLING] button from the Project Request Form.
  - Select Billing Method
    - ACTUALS *(Account Numbers required)*
    - ESTIMATE *(Account Numbers required)*
    - NO CHARGE *(Account Numbers not required)*
  - Select Markup Code *(Use List of Values, CTRL/L if needed)*
  - Select the Account Numbers to Charge *(Use the List of Values, CTRL/L)*
  - If Account Numbers are not available, new values can be entered. Please contact your local Business Coordinator
    - Account Number: Enter Account Number up to 8 characters, *(Use the List of Values, CTRL/L if needed)*
    - Subsidiary: Enter Subsidiary up to 2 characters, *(Use the List of Values, CTRL/L if needed)*
    - Object Code: Enter Object Code up to 3 characters, *(Use the List of Values, CTRL/L if needed)*
    - Activity Code (not mandatory): Enter Activity Code up to 4 characters, *(Use the List of Values, CTRL/L if needed)*
- Close Billing Window by clicking on the X in the upper right hand corner.
- Close the Project Request Form by clicking on the X in the upper right hand corner.

Step 2: A determination is made whether the scope of the work is related to a pre-loaded survey identified project

Step 3: The survey identified Project Request is associated

- Access Project Workbench Form by clicking on the form in the Navigator. *(PROJECT/PROJECT WORKBENCH)*

- Select the Project Request which is the related pre-loaded survey identified project from the Project Workbench Form
- Highlight the Project Number and copy the value by pressing [Ctrl] and C key together
- Select the Project Request that is relate to a pre-loaded survey identified project
- Click on [View Plan] button
- Click into Parent Project data field
- Paste the Project Number by pressing [Ctrl] and V key together.

➢ Close the Project Request Form by clicking on the X in the upper right hand corner.

Step 4: Project Request phases are entered.

- Select from the existing folders *(Use the List of Values, CTRL/L if needed)*

Or

- Create new private folder
- Click on [EDIT] button
- Click on [DUPLICATE] button to duplicate existing folder
- Enter the New Folder name *(60 characters can be entered)*
- Change the order of columns to be displayed *(Use the Move fields up/Move fields down button)*
- Select the Primary and Secondary order of the columns *(Use the List of Values, CTRL/L if needed)*
- Select the sorting order *(Ascending or Descending)*
- Click on the [FILTER] tab to select the criteria: *Project Manager, Site, Maintenance Type, Requestor, Maximum Priority, Status, Assign To & Building (Use the List of Values, CTRL/L if needed)*
- Click on [DISPLAY] tab to complete the folder changes
- Check to see the Private checkbox is checked
- Check to see the Save Changes checkbox is checked
- Select the Project Request to view and click on the [VIEW PLAN] button from the Project Workbench Form

Step 5: A determination is made for the availability of labor.

- [YES] Create Project Phases
- [NO] Work postponed pending available labor

Step 6: A determination is made for the availability of funding.

- [YES] Create Project Phases
- [NO] Work postponed pending available funding

Step 7: Project Phases are created per shop.

- Copy the Project Request Number *(CTRL/C)*
- Access Phases Form by clicking on the [PHASES] button from the Project Planning Form
- Click on [ADD] to enter a new phase
  - Paste the Project Request Number *(CTRL/V)* into the description of work *(64 characters can be entered)*

General Information

- Enter Status *(Use the List of Values, CTRL/L if needed)*
  - APPROVED (Customer has approved estimate for phase)
  - DEFERRED (Postponed due to funding or resources)
  - ESTIMATING (Project Phase is being estimated)
  - CANCELED (Customer has rejected estimate for Phase)
  - SCHEDULED (Work Order will automatically be created by CAMIS)

- Enter Start Date
- Enter Duration *(1 day=1d, 2 weeks=2w, 3 months=3m, 4 years=4y)*
  - Due Date is automatically calculated based on Start Date and Duration
- Enter Method
- Enter Requested Start Date *(Customer Requested Start Date)*
- Enter Requested End Date *(Customer Requested End Date)*

Primary Labor Information

- Enter Crew *(Use the List of Values, CTRL/L if needed)*
- Enter Craft *(Use the List of Values, CTRL/L if needed) (Optional)*
- Enter Crew size *(Optional)*
- Enter Estimated hours

(Primary) Task List Information

- Click in the Task List to enter necessary steps.

Secondary Labor Information, if applicable

- Access the Secondary Labor Form by clicking on the [LABOR] button from the Phase Form
  - Enter Crew *(Use the List of Values, CTRL/L if needed)*
  - Enter Crew size
  - Enter Craft *(Use the List of Values, CTRL/L if needed)*

- Enter Estimated hours
- Enter (Secondary) Task List
- Close the Secondary Labor Form by clicking on the X in the upper right hand corner

Estimate Information

- Access the Estimate Form by clicking on the [ESTIMATE] button from the Phase Form
  - Enter Estimated Material charge
  - Enter Estimated PO charge
  - Enter Estimated Contingency charge
- Close the Estimate Form by clicking on the [OK] button
- Close the Phase Form by clicking on the [OK] button

Repeat Step 7 to Add additional phases to the Project at any time during an active project

- Close the Phase Summary Form by clicking on the X in the upper right hand corner
- Close the Project Plan Form by clicking on the X in the upper right hand corner

Step 8: Project Requests and phases are screened within Project Workbench.

- Access the Project Plan by clicking on the [VIEW PLAN] button from the Project Workbench Form
- Update the Project Plan and Phase information as necessary
- Close the Project Plan Form by clicking on the X in the upper right hand corner

Step 9: A determination is made for the scheduling of phases.

- [YES] Schedule Project Phases
- [NO] Work postponed pending available funding or labor

Step 10: Project Phases are scheduled within Project Workbench, at a later date.

- Access the Schedule Project Form by clicking on the [SCHEDULE] button for the Project you selected from the Project Workbench Form
  - Click on the SCHED box to select the Phase(s) being scheduled
  - Click on the [SCHEDULE] button to schedule the phases

- Work Order number will be generated for each scheduled phase

- Close the Schedule Project Form by clicking on the X in the upper right hand corner
- Close the Project Workbench Form by clicking on the X in the upper right hand corner

Step 11: Work is postponed pending available labor.

- Access Project Workbench Form by clicking on the form in the Navigator. *(PROJECT/PROJECT WORKBENCH)*
  - Enter Site *(Use the List of Values, CTRL/L if needed)*
  - Enter Building *(Use the List of Values, CTRL/L if needed)*
  - Enter Project Manager *(Use the List of Values, CTRL/L if needed)*
  - Enter Assigned To *(Use the List of Values, CTRL/L if needed)*
  - Click on [FIND] button
  - Select the Project Request to view and click on the [VIEW PLAN] button
  - Change Status
    - ON HOLD (Use the List of Values, CTRL/L if needed)
  - Save the Project *(CTRL/U)*
- Close the Project Planning form by clicking on the X in the upper right hand corner.

Step 12: Work is postponed pending available funding.

- Access Project Workbench Form by clicking on the form in the Navigator. *(PROJECT/PROJECT WORKBENCH)*
  - Enter Site *(Use the List of Values, CTRL/L if needed)*
  - Enter Building *(Use the List of Values, CTRL/L if needed)*
  - Enter Project Manager *(Use the List of Values, CTRL/L if needed)*
  - Enter Assigned To *(Use the List of Values, CTRL/L if needed)*
  - Click on [FIND] button
  - Select the Project Request to view and click on the [VIEW PLAN] button
  - Change Status
    - AWAIT $$ *(Use the List of Values, CTRL/L if needed)*
  - Save the Project *(CTRL/U)*
- Close the Project Planning form by clicking on the X in the upper right hand corner.

Step 13: Report detailing Project Request Cost History is printed.

- Access the Reports from the Project Workbench by clicking on the form in the Navigator. *(PROJECT/PROJECT WORKBENCH)*
  - Select [REPORTS] to access the reporting option

- Select the report and [RUN REPORT]
- Enter specific parameter data, if needed *(Case sensitivity, use only uppercase)*
- Change DEST TYPE to PRINTER
- Click on [RUN REPORT]

➢ Close the Project Workbench Form by clicking on the X in upper right hand corner

E. Document Control

Questions, suggestions, and corrections should be forwarded to CAMIS.helpdesk@state.ma.us.

F. Process Flow